

# Electronic Benefit Transfer (EBT) Project



## **Request for Proposal for EBT Services**

*Section 10, Demonstration*

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***RFP-OSI-0530-204***

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California Health and Human Services Agency  
Office of Systems Integration

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## 10 Demonstration

After evaluation of final technical proposals, bidders will be invited to provide a demonstration of their EBT system and services. The demonstration will take place in Sacramento, California. Bidders are responsible for all costs associated with conducting the demonstration.

The demonstration will be scored. Bidders should refer to Section 9.5.5.1, Scoring Demonstration, for information on how the demonstration will be scored.

### 10.1 Demonstration Objectives

During the demonstration, bidders will have the opportunity to present their EBT solution. The state understands that California has specific functionality that may not be currently available on a bidder's system. The bidder should therefore identify those functional areas where development will be required, its initial concept for where the functionality will reside, and how the user will access it.

The state will evaluate the overall usability of the proposed solution. The state will review the application for:

- Organization.
- Navigation.
- Screen or page layout.
- Logical use of controls<sup>13</sup> (e.g., radio buttons, list boxes, check boxes).
- Use of checkboxes, radio buttons, drop down menus, selection lists, etc.
- System help/online assistance.

### 10.2 Demonstration Approach

#### 10.2.1 Location and Facility

The demonstration shall be conducted at the EBT Project Office in Sacramento, California. The address is:

EBT Project Office  
2525 Natomas Park Drive, Suite 100  
Sacramento, CA 95833

Telephone: (916) 263-4300

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<sup>13</sup> An example of logical use of a control would be the use of two (2) radio buttons where the user must select one (1) of two (2) mutually exclusive items.

The EBT Project Office has a large conference room that seats up to 49 people. The bidder can expect that approximately 20 state and county personnel will attend the demonstration. The bidder should have, at a minimum, the proposed Project Manager and Technical Manager in attendance.

The state can provide the following equipment:

- Pentium 4 or Celeron personal computer equipped with Internet Explorer V6<sup>14</sup>.
- An Internet connection and/or telephone line suitable for use with a modem.
- Projector and screen.

Bidders are expected to provide all additional equipment needed to support their demonstration.

If the bidder believes that a more valid demonstration can be given at another location, the bidder may request this and provide documentation as to the benefits in doing so. All proposed alternative locations must be within 25 miles of Sacramento, California. If an alternative location is approved, the bidder must make all arrangements for the demonstration and location at no cost to the state.

### **10.2.2 Date and Time**

Bidder demonstrations will be conducted on the date specified in Section 1.10, Key Action Dates. The state will contact the bidder to schedule the appointment. The demonstration shall be held on a business day (Monday through Friday) during normal business hours (9:00 a.m. to 5:00 p.m. Pacific Time). The demonstration, excluding preparation, shall be no more than two (2) hours long.

## **10.3 Functionality to be Demonstrated**

### **10.3.1 Administrative Application Functionality**

The bidder's demonstration of its administrative application will include the following components:

1. Log on/off of the EBT system.
2. Create an EBT account (includes adding primary cardholder demographic data, selecting card access rights, and adding an additional cardholder).
3. Add food stamp and cash benefits.
4. Create an EBT card.
5. Execute account debit/grant repayment.

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<sup>14</sup> The state will notify the bidder if it moves to a newer version of the software listed.

6. Search cardholder and card number (by case number, cardholder name, and Social Security Number).
7. View card history and associated details.
8. View transactions and transaction details.
9. View account status.
10. Reactivate dormant account.
11. Deactivate EBT card.
12. Conduct PIN unlock.
13. View settlement information.
14. View file transfer status.
15. Search by retailer.
16. View transactions by retailers.
17. View correction requests or claims.
18. Modify correction request status.

The demonstration of administrative application functionality shall be conducted using the actual EBT application with test or sample data. The bidder will perform the data entry during the demonstration.

At the demonstration, the state will provide demographic and benefit values to the bidder to use in creating an EBT account, executing an account debit, and adding and deleting benefits.

### **10.3.2 PIN Selection Equipment**

The bidder's demonstration of PIN selection equipment will include the following components:

- Select PIN
- Change PIN

The bidder may present other related functions, if applicable.

### **10.3.3 Card Printer Equipment**

The bidder will be asked to print an EBT card using its proposed card printer. The bidder may present other related functions, if applicable.

### **10.3.4 Reports**

The bidder's demonstration of reporting functionality will include the following components:

- Access reports
- Select and view report
- Download report data

The bidder may present other related functions, if applicable. Sample reports are recommended but not required.

### **10.3.5 Deficiency Management**

The bidder must demonstrate its approach and processes for deficiency management as described in Section 6.35, Deficiency Management.

## **10.4 Bidder Materials**

The bidder must provide one (1) electronic copy (in Microsoft Office 2003 and/or Adobe® Portable Document Format [.pdf]) and 40 printed copies of all presentation materials to the state. Only presentation materials will be accepted. Material unrelated to the presentation will not be accepted.